SFA Modernization Partner Program
Monthly Management Services Summary
For the Month of January 2001

February 10, 2001

38.2.3b- MONTHLY MANAGEMENT SERVICES SUMMARY

TABLE OF CONTENTS

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## I.	INTRODUCTION

This report covers the month of January 2001 and includes the following:

- Information on overall project completions/ implementations for this reporting period.
- Major milestones achieved during the month.
- Program level risks and issues.
- Monthly scorecards.
- Significantly late deliverables.

This report format is the result of a collaborative effort between SFA and Modernization Partner executives to improve the information provided to SFA Executives. We will continue to refine these monthly summaries to improve their usefulness and value. Please provide any suggestions regarding these reports to the SFA Modernization Partner Program Manager (elisabeth.s.schmidt@accenture.com or 202-651-3640).

II. PROJECT COMPLETIONS/ IMPLEMENTATIONS FOR THIS REPORTING PERIOD

This section reports on the completion or implementation of Modernization Partner projects.

STUDENTS

- Submitted the Call Center Optimization, Central IVR, and Common CRM Application Business Cases to SFA for acceptance. Theses deliverables complete the CRM Call Center task order, which reviewed existing SFA call center systems, processes, technologies, and people to improve efficiencies and customer satisfaction.

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III.   VALUE POINTS

This section reports value delivered above and beyond the contracted scope of services.

STUDENTS
- Developed a presentation for the CRM Call Center IPT sponsor to present to SFA leadership and the Call Center Operating Partners regarding proposed solutions and recommendations.

SCHOOLS
- Provided content and support for an SFA outreach session updating leaders of FFEL partners on SFA initiatives.
- Assisted the eSign team by reviewing a draft of the business case, attending strategy sessions, and assembling key issues in preparation for meeting with the DSG/IRB.

ORGANIZATION TRANSFORMATION
- Developed the presentation "The Future of SFA Human Resources" for Calvin Thomas, SFA Director of Human Resources, to use at the Financial Partners All-Hands Meeting.

PROGRAM MANAGEMENT
- Identified the opportunity for SFA to compete for the 2001 Business Solutions in the Public Interest Award. This contest is sponsored by the Council for Excellence in Government, Government Executive Magazine, and the Office of Federal Procurement Policy. Also drafted an application for SFA review, approval, and submission.

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IV.   MAJOR PROJECT MILESTONES ACHIEVED

This section presents Modernization Partner's significant accomplishments on a Channel-by-Channel basis. These milestones may include the completion of a project phase or the acceptance of a major deliverable in line with the project's workplan.

CFO
- Completed vendor demonstrations and provided recommended alternatives for Electronic Records Management (ERM) system.
- Created "Key Messages" document, which provides information to users on changes and updates associated with FMS Phase III.

SCHOOLS
- Completed COD Phase III Business Case and delivered to SFA for review.

STUDENTS
CRM Call Center IPT
- Discussed industry best practices and began to validate implementation designs with the Gartner Group.

Financial Analysis & Support
- Developed options for interim financial reporting and reconciling detailed reports from EDCAPS to the reports provided by SFA that use the ABC Cost model.
- Developed draft of the Unit Cost for Free Application for Federal Student Aid (FAFSA) report.

FAFSA on the Web
- Delivered final version of creative compositions to be used on the website to SFA for approval. The compositions provide an overview of the information contained in the website.
- Presented an approach for capturing the functional requirements of "FAFSA on the Web Release 5.0" from the detailed design documentation.
- Received approval from SFA for the updated Project Plan.

CDS Simplification
- Received approval for the Data Warehouse Delinquency Report to go into production.

Direct Loan eServicing
- Finalized process flow diagrams, high-level and functional requirements in preparation for Joint Application Development (JAD) sessions.
- Conducted IPT Kick-Off meeting with SFA Repayments and Customer Care group.

FINANCIAL PARTNERS
- Held Kick-Off meeting for the Financial Partners Data Mart initiative.
- Received SFA acceptance of the FFEL Retirement IPT Project Charter, which outlines program objectives, goals, and tasks.

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IV. MAJOR PROJECT MILESTONES ACHIEVED (continued)

ORGANIZATION TRANSFORMATION

- Delivered SFA Competency Model Job Aid and workbooks used to facilitate working sessions with each channel and organization unit. The working sessions focused on educating the leadership teams on how to develop achievement level standards for the functional skills in the SFA Skill Catalog.
- Delivered a Communication Plan outlining the strategy, messages, and timeline for Employee Development Center (EDC).
- Drafted an initial model of the EDC, including its vision, mission, roles and accountabilities.
- Delivered the SFA Job Inventory, which will be used by EDC to assist SFA employees in finding the appropriate role within their organization.
- Completed assessment of SFA University's Knowledge Management needs and requirements based on a series of working sessions with SFA University's Knowledge Management team.
- Reviewed high-level Front-to-Back course content with Candy Kane and developed Front-to-Back Facilitator Selection Process and related communication plan.

CIO

School Portal/IFAP
- Completed software fixes and testing of the School Portal and IFAP application. A production readiness review is being scheduled for February 5, 2001 and the go-live is targeted for February 12, 2001.

SDLC/IPT Process
- Reviewed the Software Development Lifecycle Process Guide, Deployment Plan and Presentation Materials with SFA. The process guide is targeted for completion in early February with a rapid deployment schedule.

Portal Strategy
- Completed the collection of desired features from SFA business units, allowing for the completion of the SFA Portal Strategy in early March. The product and architectural recommendations from the SFA Portal Strategy are expected to undergo hands-on testing immediately after the strategy has been accepted.

PROGRAM MANAGEMENT

- Achieved compliance with Capability Maturity Model (CMM) Level 3 standards for the Program Management Office.
- Obtained concurrence on a revised Application Architecture graphic for the Target State Vision from the SFA COO and SFA CIO. Currently revising key graphics in the Vision to reflect input from the SFA COO. A strategy for updating the Vision will be finalized once these key graphics are complete.
- Submitted the Modernization Blueprint to the SFA Deputy CIO for final review. Received and incorporated feedback on the Modernization Blueprint from the SFA General Managers.

V. RISKS AND ISSUES

This section reports the issues and risks that are currently having or could potentially cause a very significant impact on the Modernization Partner Program's goals.

Area	Organization Transformation
Description	Key questions/issues that must be addressed by SFA leadership prior to implementation of the Employee Development Center (EDC): 1. What happens if an employee does not seek training, placement or retirement? 2. What is the maximum amount SFA is willing to invest in each employee's training? 3. How long can an employee stay in the job search loop?
Impact	If these issues are not resolved, the Union will not approve the transition process and the services of the Employee Development Center.
Assistance Requested from SFA	Management Council direction/decision regarding the three open issues listed above.
Proposed Solution/ Mitigation Strategy	Calvin Thomas will work with the Management Council to resolve the open issues.
Progress/ Resolution	Calvin Thomas plans to raise these issues at a future Management Council meeting.

Area	Organization Transformation
Description	Concerns have been raised that the proposed Performance Development Process may not fully align with SFA's overall transformation strategy.
Impact	The Performance Development Process is being reviewed internally to ensure a transformational design and approach. The implementation date will be impacted.
Assistance Requested from SFA	Calvin Thomas will present an alternative Performance Development Process to Candy Kane to verify whether the design aligns with the overall transformation approach and to discuss actions that need to be taken to receive approval.
Proposed Solution/ Mitigation Strategy	Calvin Thomas will continue to work closely with the Modernization Partner HR team and the Transformation Partner to refine/develop a new approach for Performance Development Process that better aligns with the transformation strategy.
Progress/ Resolution	A series of meetings involving Calvin Thomas, SFA HR, the Modernization Partner HR team, and the Transformation Partner have been conducted and planned, to continue the redesign of the Performance Development Process.

VI. MONTHLY MODERNIZATION SCORECARDS SUMMARY

This section presents an extract of all "Red" assessed criteria. The extract is taken form the monthly Modernization Program Scorecards. (See Appendix VI. for the complete Monthly Program Scorecards document.)

Task Order	Assessment Criteria	1/31/01 Assessment	Comments
TO 12- School Portal and IFAP Conversion	Overall	Red	Software testing in the production environment was completed on 1/31/01. The task order is being modified for an extension in period of performance.
TO 32- SLDC/IPT Process Guide	Quality	Red	An SFA Modernization Partner review is underway. The quality of deliverable 32.1.2- SDLC/IPT Process Guide is being significantly enhanced due to the inability of the original team to deliver an acceptable product.
TO 34- Intranet Operations	Overall	Red	The Intranet Operations team is fully functional. Funding for SFANet operations ran out on 12/31/00. The task order has been modified to address scope changes and has not yet been awarded or funded.
TO 34- Intranet Operations	Task Order	Red	A modification to this Task Order was submitted on 1/19/01 and is waiting for approval from the CO.
TO 50- Financial Partners Data Mart	Task Order	Red	Task Order 50 was resubmitted on 01/18/01 to the COTR for approval. IRB funding has been approved for Release 1 of the Data Mart. The Task Order has not yet been approved. The SFA CIO Organization is questioning the cost associated with Release 1.